

Catalog of Courses

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Certification Program Courses

See for course schedule and syllabi online at: <http://www.azSPO.az.gov/ProcurementTraining/index.htm> .

Register for these courses online at <http://www.azgu.gov/STARS>.

Contact Saretha Jones for information registration assistance: Saretha.Jones@azdoa.gov or (602) 542-9141.

<u>Level</u>	MODULE TITLE	PREREQUISITE	WHO SHOULD TAKE	EQUIVALENCIES		
				*Years	Training	Test-out
Foundation Fee: \$100 per day	API – 601 Module I – “Fun”-damentals One day course, offered monthly	None	Procurement Associate: all agencies Procurement Technician: all agencies Procurement Specialist: all agencies Senior Procurement Specialist/Supervisor: all agencies Procurement Manager: all agencies Procurement Administrator: all agencies	2	101	Yes
	API – 602 Module II – Tools for Small Dollar Procurement (1 cent to \$10,000) One day course, offered monthly	101 or Module I equivalency	Procurement Associate: all agencies Procurement Technician: all agencies Procurement Specialist: all agencies	2	201	Yes
	API – 603 Module III – Informal Solicitations: RFQs One day course, offered monthly	201 or Module II equivalency	Procurement Associate: agencies with \$10K or more delegated authority Procurement Technician: agencies with \$10K or more delegated authority Procurement Specialist: agencies with \$10K or more delegated authority	3	301	Yes

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Specialist Fee: \$100 per day	API – 604 Module IV – Formal Solicitations: IFBs Plus One day, to be offered quarterly Pilot in March 2006?	Modules I, II and III or equivalencies	Procurement Specialist Senior Procurement Specialist/Supervisor: agencies with \$50K + delegated authority Procurement Manager: agencies with \$50K + delegated authority Procurement Administrator: agencies with \$50K + delegated authority	N/A	N/A	Petition
	API – 605a Module Va – Formal Solicitations: RFPs 1.5 or 2 days to be offered quarterly Pilot in April 2007?	Modules I, II, III, and IV	Procurement Specialist Senior Procurement Specialist/Supervisor: agencies with \$50K + delegated authority Procurement Manager: agencies with \$50K + delegated authority Procurement Administrator: agencies with \$50K + delegated authority	N/A	N/A	Petition
	API – 605b Module Vb – Evaluating Responses to Solicitations Pilot in May 2007	Modules I, II, III, and IV	Senior Procurement Specialist/Supervisor: all agencies Procurement Manager: all agencies Procurement Administrator: all agencies	N/A	N/A	Petition
Professional Fee: \$100 per day Note: Under development	API – 606 Module VI - Managing Public Procurement Pilot, March 2007	Modules I, II, III, IV, Va and Vb	Procurement Associate: all agencies Procurement Technician: all agencies Procurement Specialist: all agencies Senior Procurement Specialist/Supervisor: all agencies Procurement Manager: all agencies Procurement Administrator: all agencies	TBD	TBD	TBD

Arizona State Procurement Institute (API) Course Catalog

SPIRIT Courses

SPIRIT is the State Procurement Office's (SPO) online E-procurement system. All statewide solicitations are conducted and contracts awarded in SPIRIT. State-wide contracts may be researched on the system. SPO also uses the system to conduct solicitations over the delegated authority for agencies with limited delegated authority. There is no cost for any SPIRIT course.

See the course schedule online at: <http://www.azeps.az.gov/ProcurementTraining/index.htm>.

Contact Saretha Jones for information registration assistance: Saretha.Jones@azdoa.gov or (602) 542-9141.

TITLE	DESCRIPTION	WHO SHOULD TAKE
Navigating SPIRIT and the SPO Websites Time: one hour	Attendees are introduced to the resources of the SPIRIT and SPO websites through demonstration and examples. Neither a login nor a password is needed find statewide contract information in SPIRIT. Students learn: <ul style="list-style-type: none">• The nature and organization of the documents, links, data, and materials on the SPO webpage• How to use SPIRIT search functions to find contractors, terms and conditions, pricing, scopes of work and other information related to state-wide contracts• How to print contracts in SPIRIT• How to find assistance and further information	Procurement Associate: all agencies Procurement Technician: all agencies Procurement Specialist: all agencies Senior Procurement Specialist/Supervisor: all agencies Procurement Manager: all agencies Procurement Administrator: all agencies Program personnel: all agencies Suppliers, vendors, contractors Arizona State Purchasing Cooperative members This course is available for presentation to groups of 10 or more.

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Purchase Request/Bid list	Upon completion of this course, students are provided logins and passwords Students learn: <ul style="list-style-type: none">• How to generate a purchase request (PR) in the SPIRIT system• How to generate and print a bid list in spirit	Each state agency, board or commission may identify two individuals to receive this training and represent the agency in submitting PRs and generating bid lists. If an individual leaves agency service or changes duties within the agency. Notify the SPO IT Unit (Steve.alleman@azdoa.gov). The agency may then identify and register another individual for this course.
SPIRIT Evaluator Training	Individuals who are assigned to evaluate a request for proposals (RFP) solicitation in SPIRIT are required to take this course.	Persons identified to serve as evaluators on request for proposal solicitations. It is recommended that evaluators take the training no more than one or two weeks prior to the close date of the solicitation they are to evaluate.

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Procurement Spotlight Courses

There are no prerequisites for any of the following courses.

Register for these courses online at [http: www.azgu.gov/STARS](http://www.azgu.gov/STARS).

Contact Saretha Jones for information registration assistance: Saretha.Jones@azdoa.gov or (602) 542-9141.

<u>Level</u>	MODULE TITLE	DESCRIPTION
All No Fee	Title TBD – this course is not yet available. Projected launch FY 2007	Online overview of public procurement ethics and methods for interested citizens, elected officials, and state employees.
Specialist Fee: \$100 for one day CEUs 7.5	ADAZSPO - 501 Construction Contracting in Public Procurement <u>COURSE CURRENTLY UNDER REVISION for 2007</u>	This one-day course provides an overview of construction contracting public procurement. The focus is on the complexities of the acquisition of design and construction services in Arizona. Participants gain insight into the development of effective scopes of work, pricing methods, and evaluation criteria. The course also included discussion of project management issues and techniques. The course addresses recently legislated methods available for construction contracting in Arizona.
Specialist Fee: \$100 for one day CEUs: 7.5	ADAZSPO – 510 Specification Writing	This competency-based, one-day workshop approaches the responsibility for communication among the end-user, the procurement professional and the vendor from a technical writing perspective. Participants learn about tools and methods to avoid ambiguity, enhance clarity and increase credibility in their descriptions of services and commodities.
Specialist Fee: \$100 per day	ADAZSPO – 515 Negotiations for Public Procurement	This competency-based, one-day workshop establishes guidelines and best practices for preparing for and conducting discussions (negotiations) with prospective suppliers in the public arena. Prerequisite: Certificate in Public Procurement - AzSPO 101 and Contracting for Services, AzSPO 505.

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The Certification in Arizona State Public Procurement (CASPP) Program

Candidates for Certification in Arizona State Public Procurement (CASPP) must meet the following requirements and petition for certification to the Chief Learning Officer of the Arizona Procurement Institute:

1. Completion means either taking all six modules and passing the assessments in both the Foundation and the Specialist series of courses or meeting the prescribed equivalency for each module.
2. Students shall be required to complete Modules I, II, and III in sequence. Course equivalencies:
 - a. Fundamentals Series: course equivalency may be completed by providing evidence of two years of relevant state service, or by having completed a designated AzSPO series course, or by testing out of the material. Tests for all three Foundation Series Modules will be conducted at least twice a year.
 - b. Specialist Series: Candidates for certification must take the course unless a petition to test out is granted. Petition means that equivalency may be granted for a test-out if the applicant's petition is signed by the chief procurement officer for the applicant's agency and the application is approved by SPO.

	MODULE	PREREQUISITE	EQUIVALENCIES		
			*Years	Training	Test-out
Foundation Series	Module I – “Fun”-damentals One day	None	2	101	Yes
	Module II – Small Dollar Purchases (1 cent to \$10,000) One day	101 or Module I equivalency	2	201	Yes
	Module III – Informal Solicitations: RFQs One day	201 or Module II equivalency	3	301	Yes
Specialist Series (Projected modules)	Module IV – Formal Solicitations: IFBs Plus Projected to be one day Pilot in November 2006	Modules I, II and III or equivalencies	N/A	N/A	Petition
	Module Va – Formal Solicitations: RFPs Projected to be least two days Pilot in January 2007	Modules I, II, III, and IV	N/A	N/A	Petition
	Module Vb – Evaluating Responses to Solicitations Pilot in January 2007	Modules I, II, III, and IV	N/A	N/A	Petition
Professional (Replaces 401)	Managing a Public Procurement Shop	Modules I, II, III, IV, Va and Vb	TBD	TBD	TBD

* Relevant state service to be assessed by API on a case-by-case basis.

Arizona State Procurement Institute (API) Course Catalog

Detailed Course Descriptions

Courses for Certification in Arizona State Public Procurement (CASPP)

Note: once the student has met the prerequisite by completing or testing out of Modules I, II and III the remaining required certification courses do not need to be taken in any specific order, nor is a student required to complete them all if certification is not sought.

Foundation Series Track

API601 - Course Title: Foundations of Arizona Public Procurement, Module 1 - “Fun”damentals of Public Procurement

Content: Module I is the initial course of five courses in the Arizona Public Procurement Specialist Certification Program. Module I is a general overview of public procurement in Arizona, emphasizing compliance with statutes, rules and policies that direct the procurement of goods and services for public entities in Arizona. Topics include basic information about the roles and duties of government employees responsible for acquisition of goods and services, organization of public procurement in the State of Arizona, minority- and women-owned and small business enterprise solicitation requirements, comparison of governmental with private sector purchasing, the need for compliance with statutes, rules and policies that govern public procurement, resources for buyers, professional vocabulary, the law of agency and ethics.

Audience: Public procurement practitioners, end-users of government contracts, procurement supervisors and program managers. State employees with responsibility for purchasing goods or services, including buying from State or agency contracts or using a purchasing card, should take Modules I and II.

Assessment: This course utilizes an alternative assessment requiring the student to participate in the course session and the instructor to observe and rate the student's participation. The assessment is comprised of criteria for each of **9** learning objectives. Accuracy of recall is counted less than effort, understanding of the presented principles, active participation and rationale for answers. Note that successful completion of (“passing”) the course is contingent upon observed active participation in the class. The student must obtain a score of 75 to pass.

Prerequisite: There is no prerequisite for Module I. Module I, or its equivalent, is a required prerequisite for all other modules in the certification program. In Module I, students will receive a three-ring binder containing materials for use throughout the entire certification series.

Duration: 7.5 hours (one day)

CEUs: 7.5

Cost: \$100 for one day

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API602 - Course Title: Module II, Foundations of Arizona Public Procurement – Tools for Small Dollar Procurement

Content: Module II is the second of five courses in the Arizona Public Procurement Specialist Certification Program. Module I topics include an overview of Article 3 Supplier Source Selection, including discussions of alternative methods, P-card purchases, supplier registrations, bid lists, freight and delivery, and ethics.

Audience: Public procurement practitioners, managers and end-users of government contracts, procurement supervisors. State employees with responsibility for purchasing goods or services, including buying from State or agency contracts or using a purchasing card, are required to take Modules I and II if they have not completed Public Procurement - SPO 101. Public Procurement - SPO 101, 201 and 301 are no longer being offered.

Assessment: This course utilizes a pen and pencil test to assess the student's mastery, comprehension and ability to apply the principles of each of the **16** learning objectives of the course and observation of team tasks to assess the ability to apply the information. The written examination is "open book" and may be comprised of true/false, complete the sentence (fill in the blank), narrative answer, matching, and selection of the best answer from multiple choice questions. Accuracy of recall is counted as is the ability to apply the principles learned.

Questions are weighted with values from 5 to 15 points each. Partial credit is permitted for some questions. The student must obtain a score of no less than 75 points out of a possible 100 points on the assessment and actively and appropriately participate in class to pass this course.

Prerequisite: The prerequisite for Module II is Module I, or completion of Public Procurement - SPO 101, or a test administered by the Arizona Procurement Institute (API). The student must bring to class the three-ring provided in Module I or upon meeting Module I requirements through testing.

Duration: 7.5 hours (one day)

CEUs: 7.5

Cost: \$100 for one day

Arizona State Procurement Institute (API) Course Catalog

API603 - Course Title: Module III, Foundations of Arizona Public Procurement,– Informal or Small Dollar Purchases

Content: Module III is the third course in the Arizona Public Procurement Specialist Certification Program. The module focuses on the methods and means for conducting informal purchases, both under \$5,00 and requests for quotes of less than \$50,000. The class emphasizes code compliance. Module III topics include the elements of a contract, Article 3 – Source Selection and Contract Formation/ Part A, delegation of authority, minority- and women-owned and small business enterprise solicitation reporting, preparing specifications, purchase orders, cooperative purchasing, small dollar purchases, overview of the Uniform Commercial Code (UCC), mainlining files and documentation, and ethics – confidentiality, conflict of interest and consequentiality.

Audience: Public procurement practitioners, managers and end-users of government contracts, procurement supervisors. State employees with responsibility for purchasing goods or services, including buying from State or agency contracts or using a purchasing card, are encouraged to take Modules I and II if they have not completed Public Procurement - SPO 101. Public Procurement - SPO 101, 201 and 301 are no longer being offered.

Prerequisite: The prerequisite for Module III is Module I, completion of Public Procurement - SPO 101 or a test administered by the Arizona Procurement Institute (API). The student must bring to class the three-ring provided in Module I or upon meeting Module I requirements through testing.

Duration: 7.5 hours (one day)

CEUs: 7.5

Cost: \$100 for one day

Specialist Series Track

The following modules are currently under construction. Individuals who would like to serve as pilot or prototype evaluators should contact Saretha Jones and ask to be placed on the waiting list. Evaluators will not be charged for these courses, but will only obtain credit if they pass the assessment(s) and submit evaluation reports.

- Module IV – Formal Solicitations: IFBs Plus
- Module Va – RFPs
- Module Vb – Evaluating Offers

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Class for Vendors/Suppliers

Doing Business With the State of Arizona - AzSPO 550

The class includes discussions on registering as a supplier, exploring, defining and clarifying expectations, and common procurement terms and acronyms. Emphasis is placed on techniques of marketing products and services to State agencies, prompt payment issues, common vendor oversights and public procurement ethics. The course touches on methods of public procurement in Arizona, such as requests for quotes (RFQs), invitations for bids (IFBs), and requests for proposals (RFPs). Discussions may include best practices for responding to formal solicitations, assembling and submitting offers and the evaluation process. Pre-award and post-award activities, protests, contract administration and vendor performance are also addressed.

This class also explores the State's e-commerce process and how to navigate and respond to solicitations issued by the state's electronic procurement application, SPIRIT. The cost is \$99.

Duration: 7.5 hours (one day)

CEUs: N/A

Cost: \$99 for one day

Registration and Payment for "Doing Business with the State of Arizona": "Doing Business with the State of Arizona" course is limited to no more than 15 participants. Checks may be mailed to the State Procurement Office, 100 North 15th Avenue, Phoenix, AZ 85007, Attention: Cindy Pearson. Or call in your reservation to Cindy at (602) 542-9131 or fax it to (602) 542-5508 and bring a check with you to the class.

Registration and Payment for "Doing Business with the State of Arizona": "Doing Business with the State of Arizona" course is limited to no more than 15 participants. Checks may be mailed to the State Procurement Office, 100 North 15th Avenue, Phoenix, AZ 85007, Attention: Cindy Pearson. Or call in your reservation to Cindy at (602) 542-9131 or fax it to (602) 542-5508 and bring a check with you to the class.

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Registration, Payment and Contact Information

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Register for these courses online at <http://www.azgu.gov/STARS>.
Contact Saretha Jones for information registration assistance: Saretha.Jones@azdoa.gov or (602) 542-9141.

SPiRiT Courses

See the course schedule online at: <http://www.azSPO.az.gov/ProcurementTraining/index.htm> .
Contact Saretha Jones for information registration assistance: Saretha.Jones@azdoa.gov or (602) 542-9141.

Procurement Spotlight Courses

The following courses are currently under revision.

Register for these courses online at <http://www.azgu.gov/STARS>.

Doing Business with the State of Arizona

Registration and Payment for “Doing Business with the State of Arizona”: “Doing Business with the State of Arizona” course is limited to no more than 15 participants. Checks may be mailed to the State Procurement Office, 100 North 15th Avenue, Phoenix, AZ 85007, Attention: Cindy Pearson. Or call in your reservation to Cindy at (602) 542-9131 or fax it to (602) 542-5508 and bring a check with you to the class.

Arizona Procurement Institute (API)

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